

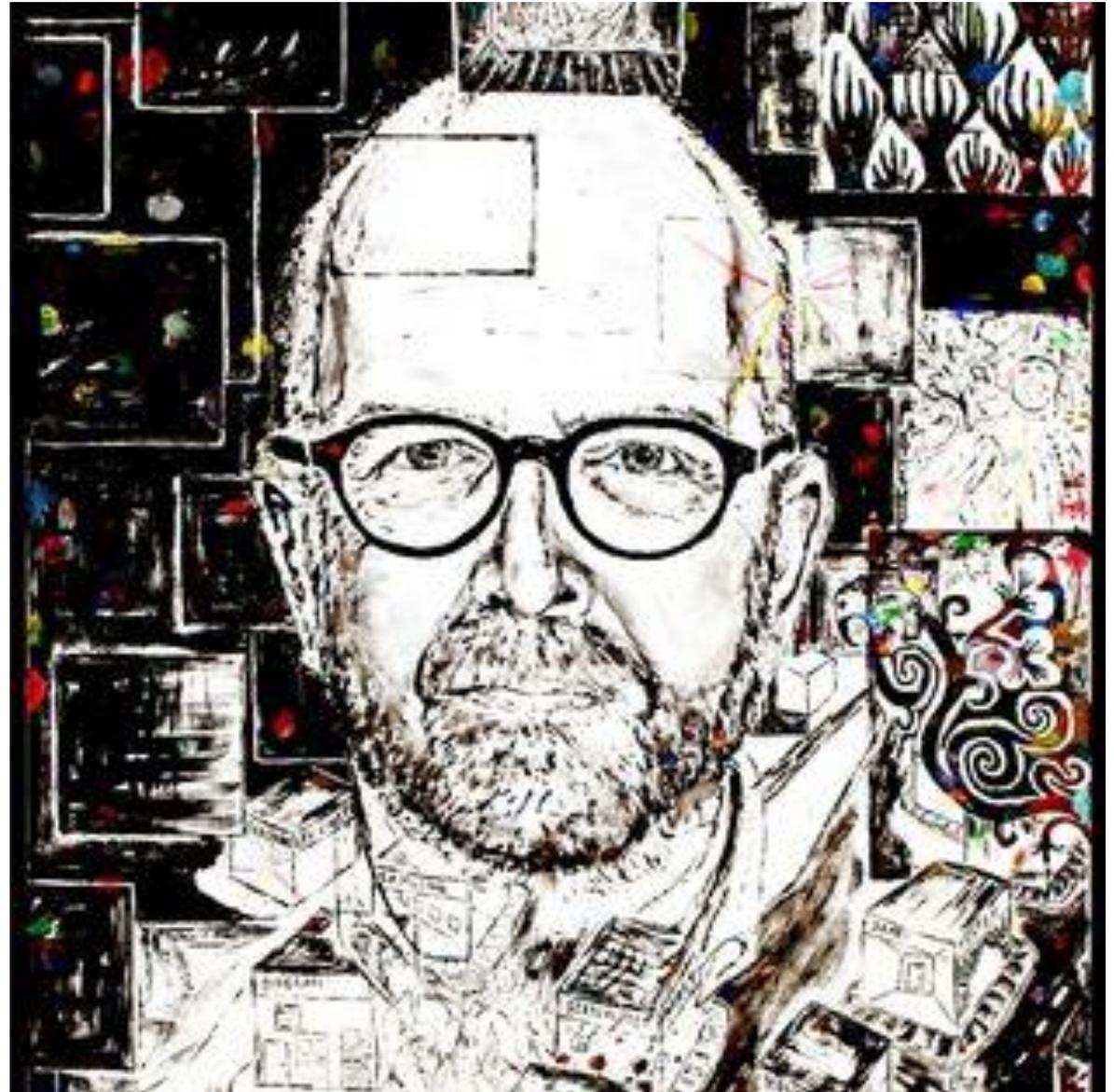
CruiseBaltic

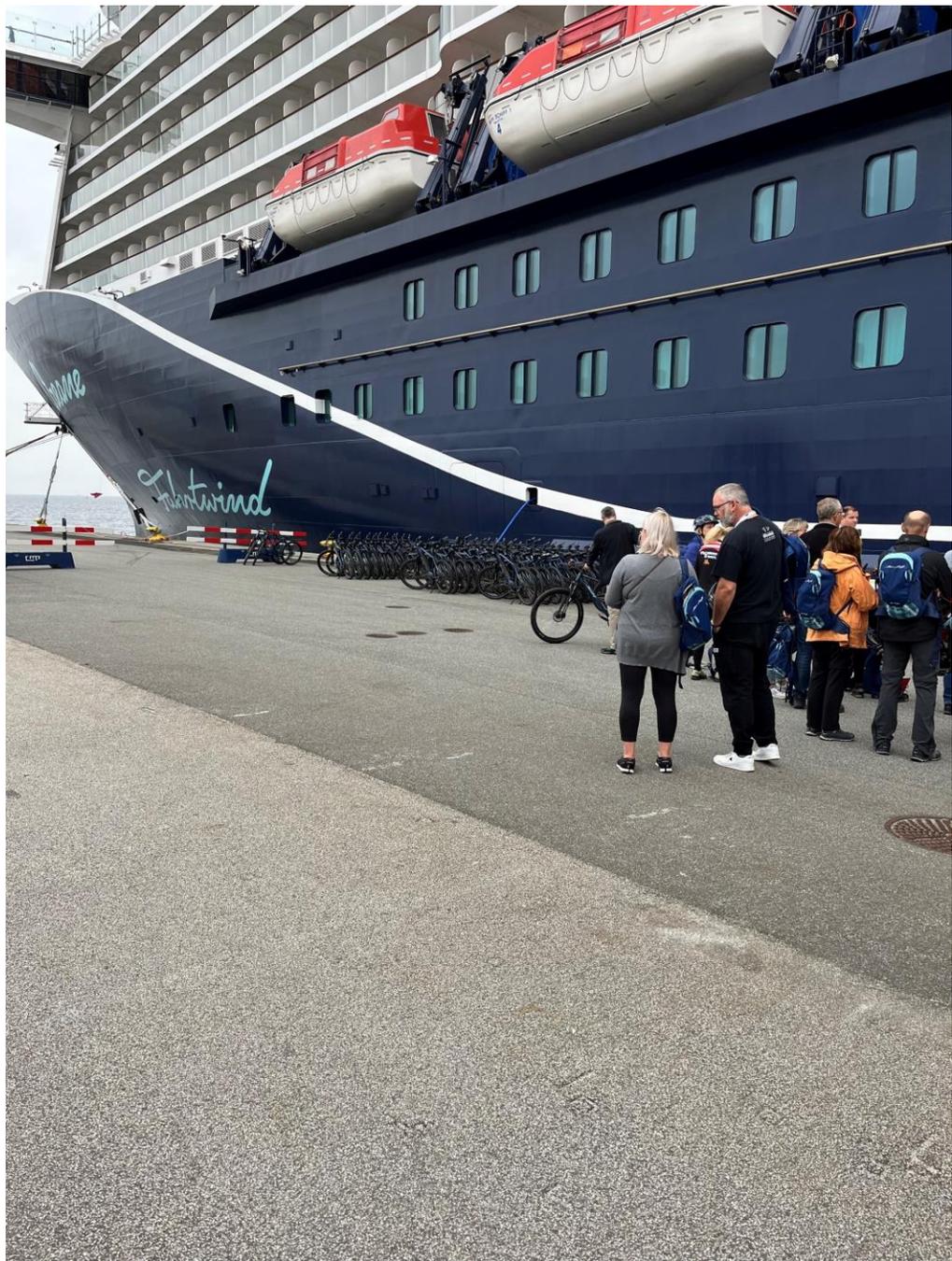


The obvious choice for responsible cruising



- **Born in Denmark 1963**
- **Actor and theatre manager**
- **Copenhagen City Council 2002 - 2010**
- **Mayor for technical and environmental affairs 2006 - 2009**
- **Mayor for employment and integration affairs 2010**
- **Director, Danish Cultural Institute, Brussels 2011 - 2014**
- **CEO, Danish Cyclists Federation 2014 - 2022**
- **Director of Cruise, Wonderful Copenhagen 2023 -**





An aerial photograph of a harbor at sunset. The sun is low on the horizon, casting a golden glow over the water and the city below. Several large cruise ships are docked at the pier, including one with 'TALLINK' written on its side. The city buildings are visible in the foreground and middle ground, with some lights starting to glow as dusk falls.

The happiest. The most innovative. The most sustainable.

The list of "mosts" just goes on and on and on.

What is it that the Northern European countries get right every time?

What is our secret?

It doesn't make sense. It's cold. The weather is bad. Some of the food is strange.

But despite the rain, rugged terrain and long winter nights, we managed to create something quietly wonderful.

An understated feeling of magic, echoing across the sea that ties the region together.

Here at Cruise Baltic, we've connected more than 30 destinations that embody the spirit, so you can uncover Northern Europe, one secret at a time.

Feel what propelled the Vikings yesterday, and what's propelling our windmills today.

Delight in the sites and sounds of ancient cities and taste the humble roots of a global culinary phenomenon.

Get inspired by architecture from the future, and stroll through small towns with strange names and friendly people.

Allow your mind to wander.

And discover why each of our destinations hold a piece of the bigger secret that makes us who we are.



The Baltic Sea region





Brand Values

Bold

We want to shape responsible cruising and act as innovative frontrunners. To do so, we need to be bold – to push for innovative and sustainable actions in every aspect possible.

Responsible

To approach life with a responsible attitude is in our Northern European DNA and something we're proud of. For us responsible is not boring. It's about committing wholeheartedly to reaching our goal and creating meaningful experiences.

Collaborative

As a network, it is in our nature to work together to elevate the Baltic Cruising experience. We believe in collaboration through knowledge-sharing, committed partnerships, a human approach and equal status among stakeholders.

Transparent

To us, transparency is essential to demonstrate our commitment and gain politicians' and the public's trust. With our "what you see is what you get"-approach, we hope to inspire the industry as a whole to more openness to avoid misunderstandings and foster a positive image around cruising.

Cruise Baltic Market Review 2024

A nighttime photograph of a harbor scene. On the left, a large white cruise ship is docked, its decks and windows illuminated. In the background, a city skyline is visible, featuring a prominent white cathedral with a large dome and several smaller domes. To the right, a Ferris wheel is lit up. The water in the foreground is dark, with some buoys visible. The overall atmosphere is serene and urban.

February 2024

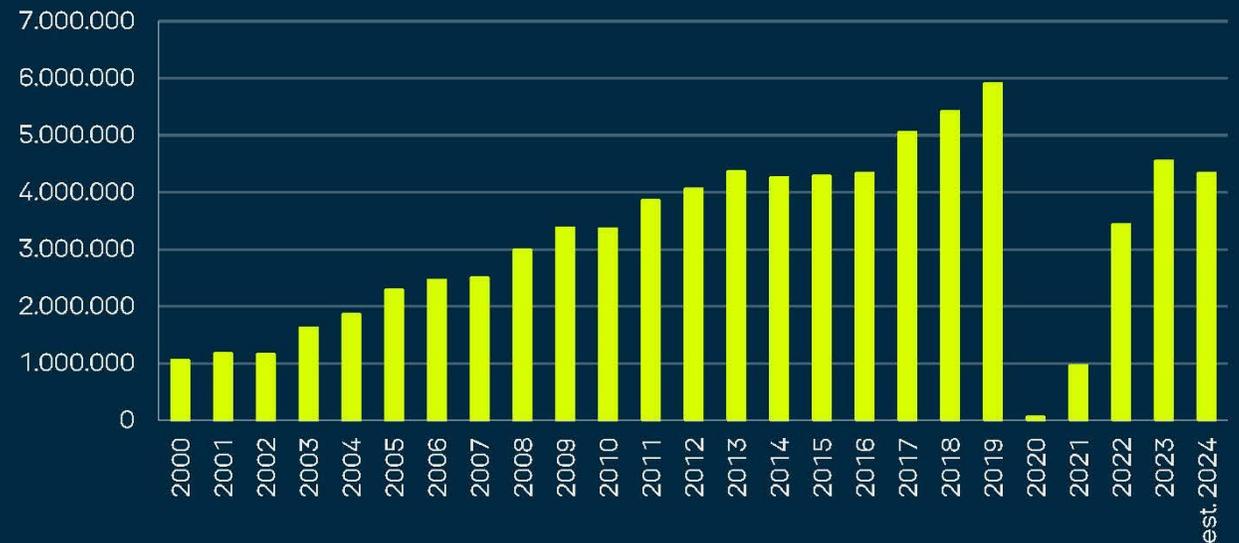
Cruise Guests

The number of cruise guests visiting the Baltic ports in 2023 increased by 32% compared to 2022.

The number of guests is expected to decrease by -5% in 2024 compared to 2023, to a total of 4,335,551 guests.

From 2017-2023 the number of calls has decreased by an average annual rate of -1.7% per year [from 5,056,398 in 2017 to 4,549,879 in 2023].

Number of guests



Annual growth rate in number of guests



Note: Due to a correction of a partner's number of pax for 2022, the data shown slightly vary from the 2023 Market Review

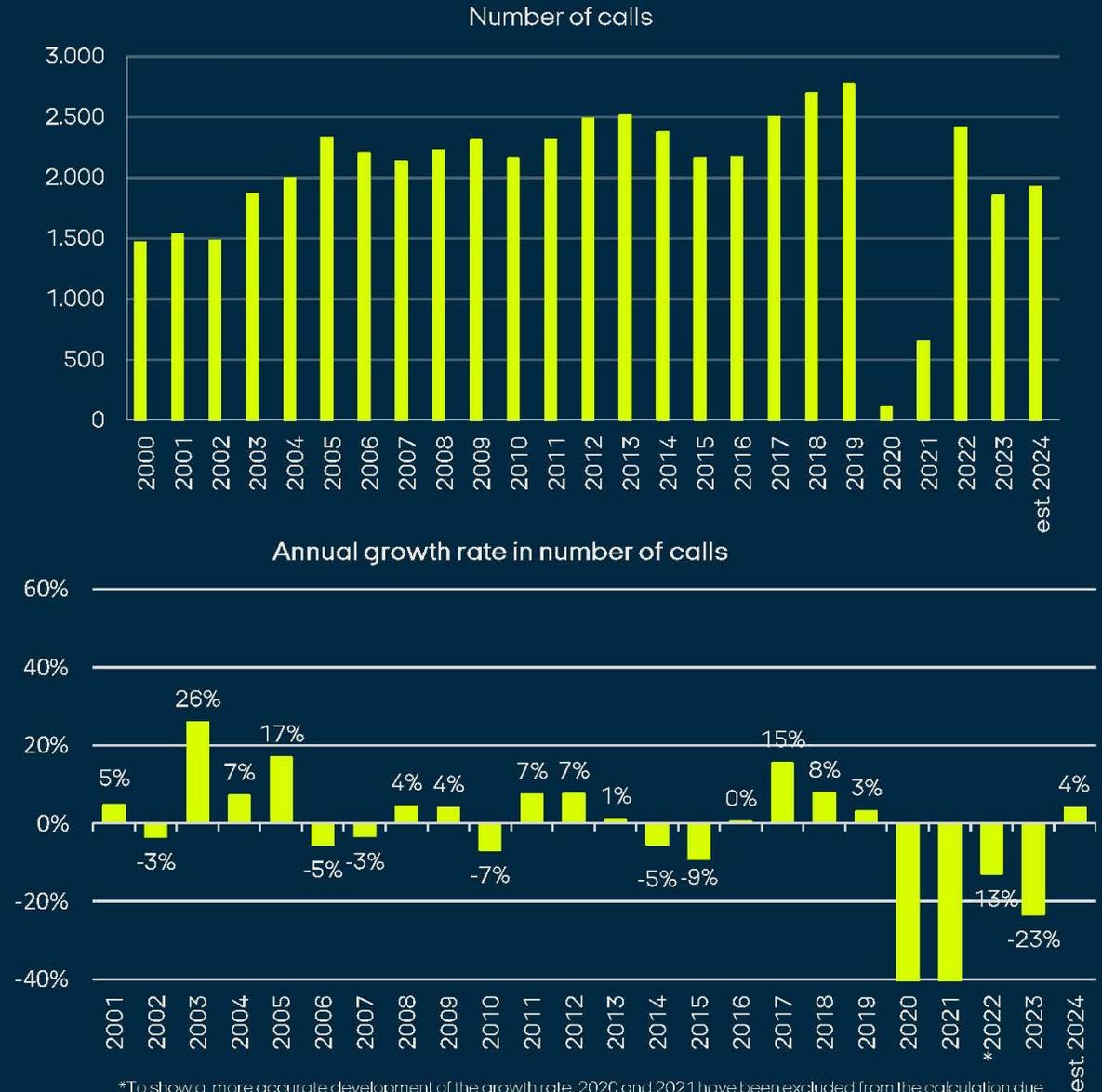
*To show a more accurate development of the growth rate, 2020 and 2021 have been excluded from the calculation due to the effect of the pandemic. The growth rate for 2022 is, therefore, related to 2019. From 2023 and onwards, this no longer applies.

Calls

The number of calls in 2023 decreased compared to 2022 and resulted in 1,853 calls, which is a decrease of -23%. This is more than estimated at the end of 2022.

The Baltic ports anticipate an increase of 4% in the total number of calls and expect 1,926 calls in 2024.

From 2017-2023 the number of calls has decreased by an average annual rate of -4.9% per year [from 2,501 in 2017 to 1,853 in 2023].



*To show a more accurate development of the growth rate, 2020 and 2021 have been excluded from the calculation due to the effect of the pandemic. The growth rate for 2022 is, therefore, related to 2019. From 2023 and onwards, this no longer applies.

Summary

In 2023, the Baltic Sea region was still faced with the side effects of the geopolitical situation. The change in itineraries has left the region very divided. While many of the easternmost ports experienced a drop in the number of calls in 2023, the more western part of the region experienced an increased interest. Expectations for 2024 are cautiously optimistic for the eastern part of the region.

In 2023 [compared to 2022]:

- The total number of cruise guests has increased by 32%
- The total number of calls has decreased by -23%
- The total number of turnarounds has decreased by -5%

The big gap between the number of calls and guests from 2022 to 2023 is presumably the result of an increased capacity of the ships while the size of the ships, in general, has become bigger. At the same time, we see an increase in the number of smaller vessels, and the estimates for 2024 show a tendency for this exact development; with predictions of a slight decrease in the number of guests and turnarounds and with an expected increase in the number of calls.

In 2024 [compared to 2023]:

- The total number of cruise guests is expected to decrease by -5%
- The total number of calls is expected to increase by 4%
- The total number of turnarounds is expected to decrease by -6%

Cruise Baltic Segments

Small [0-24 calls]	Sassnitz [1], Nyborg [1], Helsingor [2], Ystad [3], Turku [3], Kalundborg [4], Helsingborg [4], Malmö [5], Hamina [6], Kalmar [6], Kotka [7], Saaremaa [8], Fredericia [10], Arendal [13], Aalborg [16], Mariehamn [17], Karlskrona [21]
Medium [25-49 calls]	Klaipeda [41], Gdansk [42], Roenne [46]
Large [50-199 calls]	Skagen [61], Riga [62], Aarhus [66], Gothenburg [81], Helsinki [90], Tallinn [90], Visby [102], Stockholm [128], Kristiansand [129], Rostock [130], Oslo [148]
X-Large [200+ calls]	Kiel [218], Copenhagen [283]

The above is based on 2023 calls.

Since 2022, Karlskrona, Mariehamn and Aalborg moved from Medium to Small. Gdansk, Klaipeda, and Roenne moved from Large to Medium, whereas Skagen moved from Medium to Large. Lastly, Stockholm moved from X-Large to Large.



NORWAY



SWEDEN



DENMARK

FINLAND

ESTONIA

LATVIA

LITHUANIA

GERMANY

POLAND





FINLAND

NORWAY

SWEDEN

ESTONIA

LATVIA

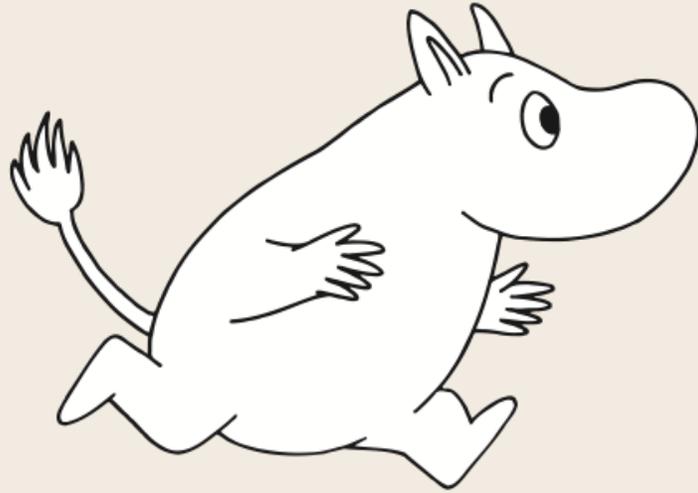
LITHUANIA

DENMARK

GERMANY

POLAND

- Oslo
- Kristiansand
- Arendal
- Skagen
- Lysekil
- Gothenburg
- Aalborg
- Aarhus
- Kalundborg
- Fredericia
- Nyborg
- Helsingor
- Copenhagen
- Helsingborg
- Malmö
- Ystad
- Roskilde
- Stockholm
- Visby
- Kalmar
- Karlskrona
- Roskilde
- Rostock
- Turku
- Mariehamn
- Helsinki
- Kotka
- Hamina
- Tallinn
- Saaremaa
- Riga
- Klaipeda
- Gdansk





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- Tallinn
- Saaremaa
- Riga
- Klaipeda







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- Saaremaa
- Riga
- Klaipeda





NORWAY



SWEDEN



FINLAND



ESTONIA



LATVIA



DENMARK



GERMANY



POLAND



LITHUANIA

Probably the most diverse cruise offering in the world:

9 countries

9 cultures

10 languages

Historical

31 UNESCO World Heritage Sites

32 destinations

European Capitals

Small towns and islands

Nature, architecture and design

Mild climate & midnight sun

English speaking

Safe

High guest satisfaction

Sustainable



PRINCESS CRUISES 2026

"On a Scandinavia and Baltic cruise, discover a whole new way of life ..."



Recently the Global Destination Sustainability Movement (GDS) announced their Index Report for 2023 and we are very proud that **7 out of the TOP 10** cities globally are part of our Cruise Baltic family.





Sustainability Manifesto

The global cruise industry has been increasing every year for the past 20 years and is expected to increase even more during the next 20 years. With a record high order book on new cruise vessels, the industry expects to increase to as much as 80 million cruise passengers in 2040 compared to 27 million passengers in 2018.

While it requires significant investment in the selected cruise destinations, the sheer number of new cruise passengers requires that the Baltic Sea cruise ports and destinations, cruise lines and the local authorities work together to increase sustainability in the region.

The Cruise Baltic Sustainability Manifesto is the first regional initiative which focuses on the sustainability of cruising worldwide. The Manifesto follows the Global Sustainable Development Goals and the below vision should be achieved by 2030.

Sustainability Vision



Making cruising a sustainable vacation offer in 2030

Economic sustainability

It is our objective to increase the local economic value of cruise tourism

- Have cruise lines purchasing more provisions and services locally
- Make port-city infrastructure as seamless as possible to save time in transit
- Assist shop-owners in increasing revenue from cruise guests by education. Internationalisation, improved signage, currency acceptance and to understand the various cruise customer segments are all part of the education.
- Develop digital and analogue initiatives to promote local shopping
- Develop initiatives for crew shopping

Social sustainability

It is our objective to further increase the popularity of cruising with the locals

- Communicate the facts about cruising and congestion
- Promote attractions and sights outside of the city centre
- Extend the cruise season
- Organise open ship days locally and/or regionally
- Organise close cooperation at destinations when more ships are in port
- Involve local citizens in the cruise calls

Environmental sustainability

It is our objective to minimise the environmental effects of cruising

- Investigate cruise ship emissions
- Investigate noise levels of cruise vessels
- Encourage ports to invest in port reception facilities for grey water
- Communicate facts about cruise ship emissions
- Analyse shore power solutions and the need for standardised connections
- Encourage ports to reward environmentally friendly vessels
- Communicate environmental initiatives from various cruise lines
- Investigate the use of electric vehicles to minimise exhaustion and noise
- Encourage "green" shore excursions

A person in a dark winter coat stands on a snowy, icy landscape at sunset or sunrise. The scene is backlit by the sun, creating a warm, golden glow. The person is silhouetted against the bright light. The ground is covered in snow and ice, with some rocks visible. In the background, there are trees and a body of water. A bright yellow circle graphic is positioned to the right of the year '2023'.

CRUISE BALTIC SUSTAINABILITY REPORT 2023

CruiseBaltic

3 Key takeaways



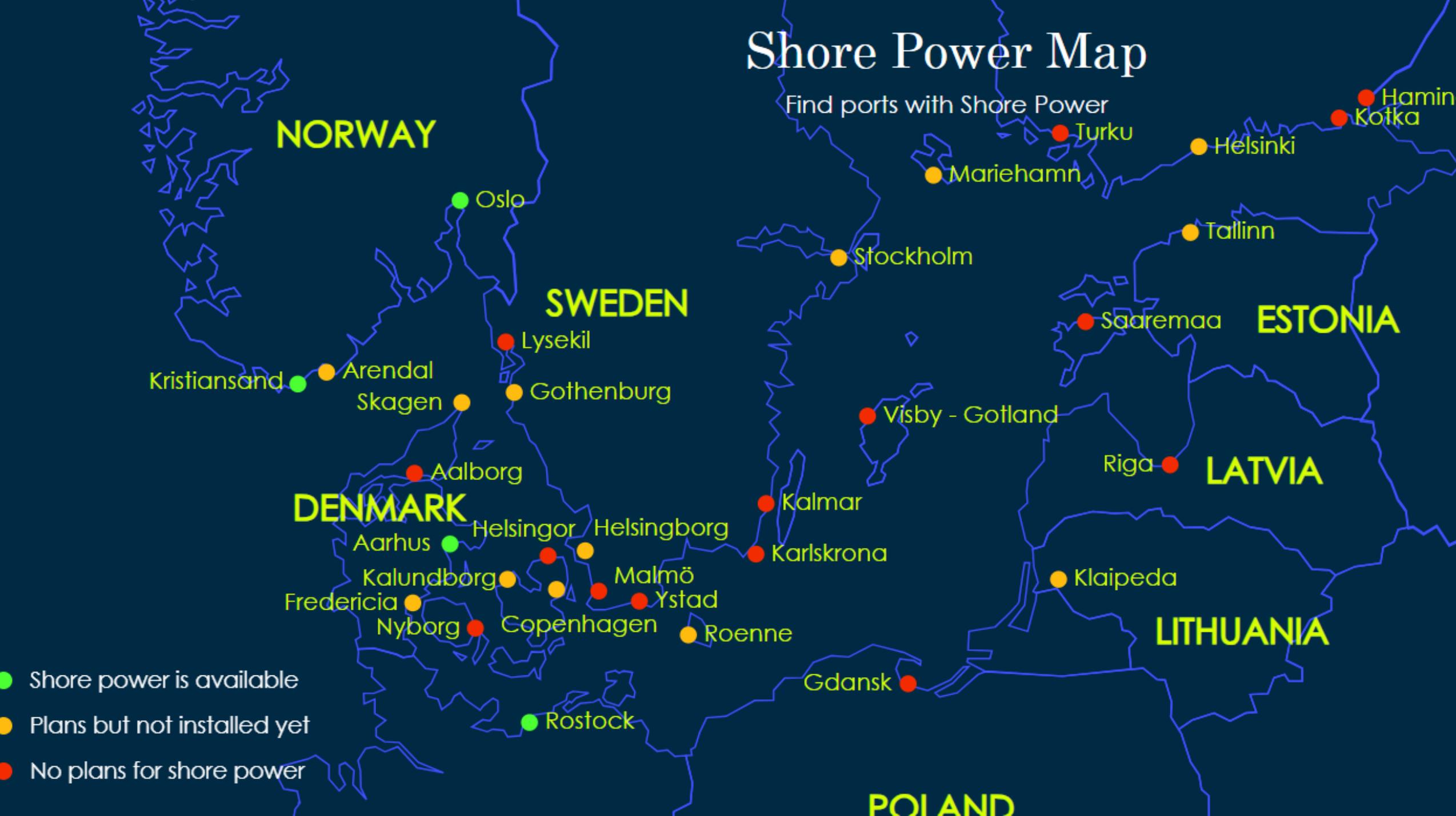
The destinations in Cruise Baltic have a strong focus on extending the season by making the region attractive all year round.

Our partners are actively working to increase local economic value by enhancing port-city infrastructure, promoting local shopping, and educating locals to better cater to cruise guests etc.

Implementing onshore power supply is a strong commitment to the partners of Cruise Baltic, and even though it can be an extensive process, we are moving in the right direction.

Shore Power Map

Find ports with Shore Power



- Shore power is available
- Plans but not installed yet
- No plans for shore power

CRUISE CREW ACTIVITY GUIDE

WELCOME TO THE BALTIC SEA REGION



Uncover the secrets of Northern Europe



CruiseBaltic

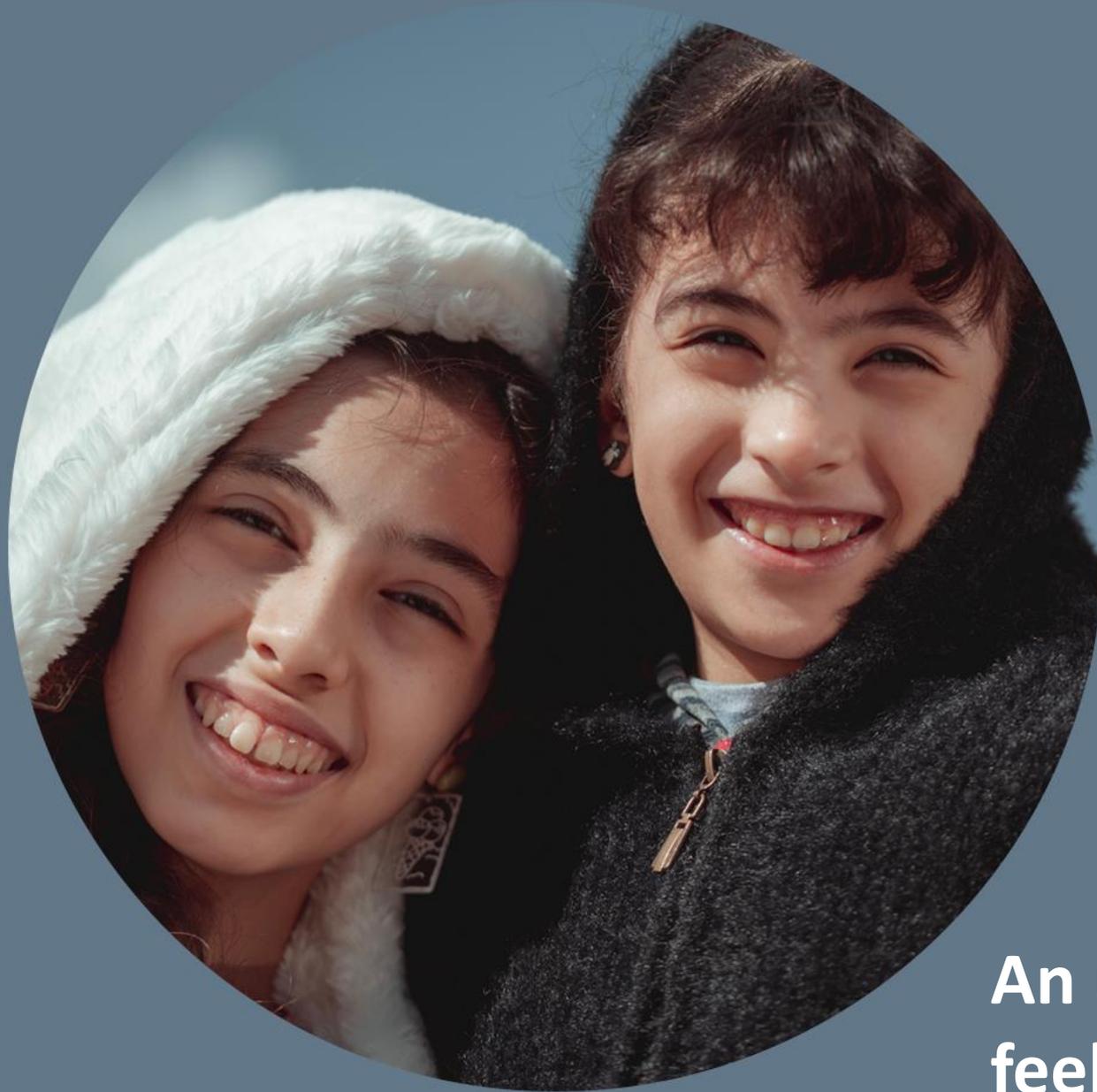
But beware.
When you cruise the quietly wonderful Baltic Region, side effects may include:



**A sudden
appreciation
for design.**

A newfound love for
the simple things.

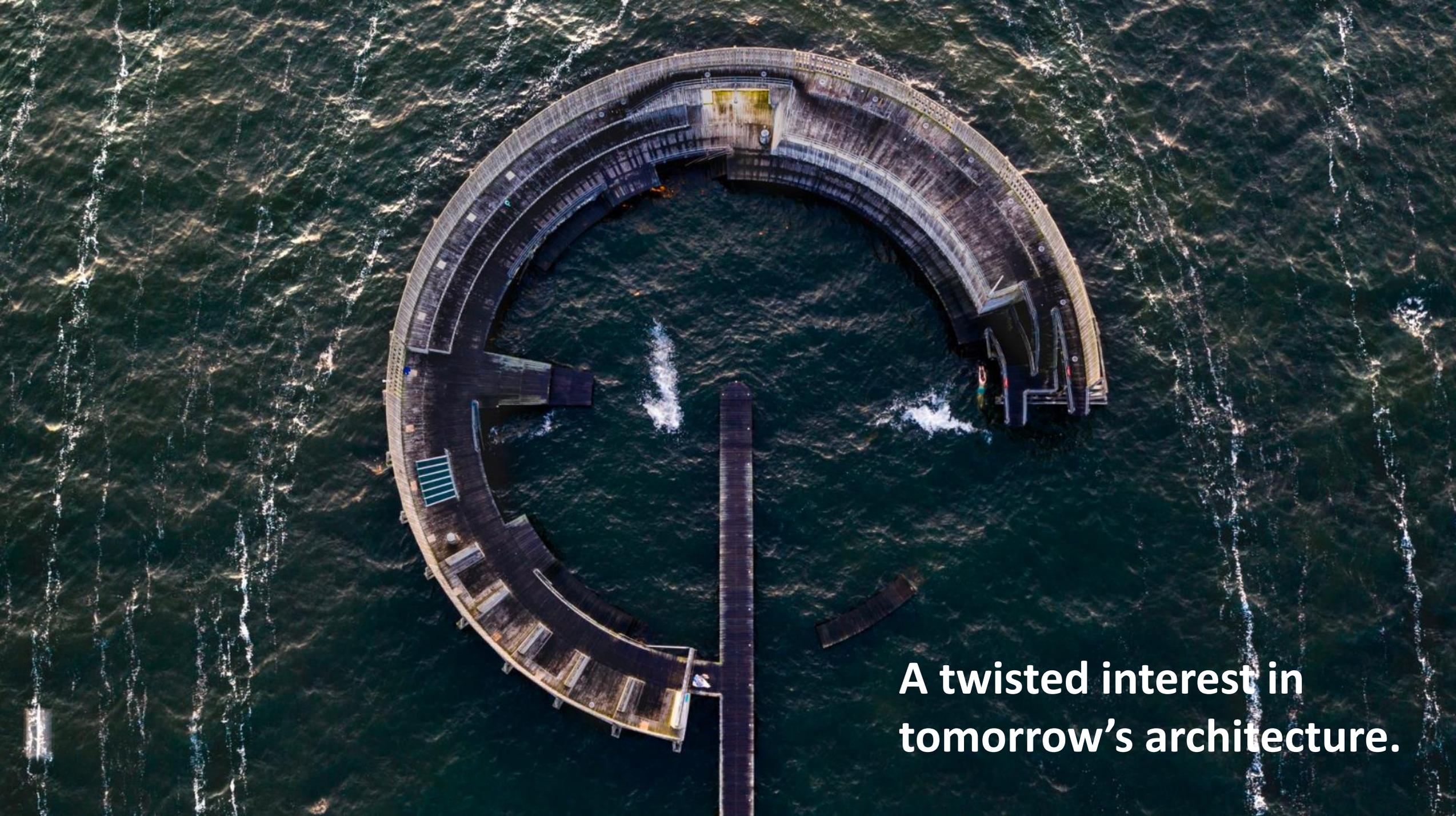




**An unmistakable
feeling of happiness.**



**An increased sense
of love for all.**



**A twisted interest in
tomorrow's architecture.**

And a strong craving for
odd local ingredients.



All yours to enjoy and bring
back home as you...

Uncover the Secrets of Northern Europe

CruiseBaltic

Strategic Partner



SAS
Scandinavian Airlines

THE CRUISE BALTIC TEAM



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